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FLORIDA HOMEOWNER PLANNING RESOURCE

Whole-Property Energy Upgrade Planning Guide

A practical framework for gathering evidence, setting priorities, sequencing connected projects and comparing proposals before installation begins.

Use this guide when you are considering:

- HVAC and ducts
- Insulation and air sealing
- Roofing
- Solar
- Battery storage
- Electrical upgrades
- EV charging

Prepared by BetterPowered, a Florida energy advisory service serving homeowners and property owners through assessment, planning, decision support and vetted contractor matching.

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1 · START WITH THE DECISION

Define the outcome before choosing equipment

“Lower my energy bill” is usually too broad to guide a sound project. Florida properties often have overlapping comfort, moisture, resilience, equipment-age and electrical-capacity constraints. A useful plan starts by ranking the outcomes that matter and identifying what evidence would change the decision.

Comfort

Document hot or cold rooms, humidity patterns, noise, drafts and the times or weather conditions when they occur.

Efficiency

Review consumption patterns and likely drivers before assuming that one replacement will produce the expected savings.

Resilience

Clarify which loads should operate during an outage, for how long and under what constraints.

Electrification

Consider future HVAC, water heating, cooking, battery and EV loads together with panel and service capacity.

> **A planning rule:** Do not let the first contractor who visits define the entire problem around the product that contractor sells.

Write a one-sentence project objective

Primary outcome

Secondary outcome

Hard constraint: budget, timing, insurance, roof age, panel capacity or another factor

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Decision deadline and reason

Related resource: BetterPowered energy advisory services.

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2 · BUILD THE EVIDENCE FILE

Collect what a defensible recommendation needs

A useful assessment distinguishes between facts already supported by records or observation and questions that require field verification. This prevents estimates from being treated as diagnoses.

- [ ] **Utility history:** at least 12 months when available, including billing period, energy use and rate changes.
- [ ] **Equipment data:** model and serial numbers, approximate age, service records, fuel type and observed operating issues.
- [ ] **Building context:** conditioned area, construction era, additions, occupancy patterns and recent renovations.
- [ ] **Envelope clues:** attic access, visible insulation, roof condition, window types, moisture history and known air-leak locations.
- [ ] **Electrical context:** main service size, panel labeling, available spaces, major loads and planned EV or storage equipment.
- [ ] **Proposals and photos:** preserve the full scope, exclusions, warranties, equipment identifiers and supporting images—not only the price page.

> **Evidence boundary:** Remote records, photographs and structured data can help organize the problem. They do not replace measurements, destructive investigation, code review or licensed trade work when those are required.

Questions that commonly need field verification

- Whether ducts are leaking, undersized, damaged or outside the effective pressure boundary.
- Whether insulation is continuous and whether air sealing should occur before more insulation is added.
- Whether observed humidity is driven by infiltration, runtime, sizing, controls, drainage or multiple causes.
- Whether roof, structure, electrical service and interconnection conditions support a solar or storage design.
- Whether proposed work triggers permits, utility review or other site-specific requirements.

Related resource: home energy audits and assessments in Florida.

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3 · SEQUENCE CONNECTED WORK

Use dependencies to avoid rework

Project sequence should follow property conditions, safety, equipment urgency and financial timing. The sequence below is a reasoning framework—not a universal prescription.

1. **Resolve safety, active water intrusion and urgent failures.**
   Protect the property and occupants before optimizing performance.
2. **Clarify the building enclosure and roof path.**
   Roof replacement, attic work, moisture remediation and air-sealing access can affect later scopes.
3. **Reduce avoidable loads where justified.**
   Envelope and duct improvements can change heating and cooling requirements and comfort outcomes.
4. **Size and select HVAC from current conditions.**
   Avoid relying only on the capacity of the equipment being replaced.
5. **Confirm electrical capacity and future loads.**
   Coordinate panel, service, battery, solar and EV charging decisions before equipment locations are locked.
6. **Evaluate generation and storage against the revised load profile.**
   A proposed solar or battery system should reflect actual goals, tariffs, roof constraints and critical-load strategy.

> **Exception handling matters.** A failing air conditioner during a Florida summer may need immediate replacement. The plan should then record which assumptions were made and which complementary work remains.

Three questions before approving a sequence

1. Will an earlier project be disturbed, duplicated or invalidated by a later one?
2. Will the first project change the sizing or economics of the next?
3. Who owns coordination when scopes from different contractors overlap?

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4 · COMPARE PROJECT PATHWAYS

Connect each proposal to the rest of the property

Project area	Evidence to request	Common dependency	Decision question
HVAC	Load basis, equipment match, efficiency ratings, controls, drainage and warranty	Ducts, enclosure, humidity and electrical capacity	What supports the proposed capacity and configuration?
Ducts	Condition, leakage or pressure evidence, accessibility and repair scope	HVAC airflow, attic access and insulation	Will the scope correct the documented delivery problem?
Insulation / air sealing	Existing levels, coverage, leakage pathways, moisture and ventilation considerations	Roof work, ducts, combustion safety and attic access	What must be sealed or repaired before insulation is added?
Roofing	Assembly, underlayment, ventilation, structural findings, warranty and permit scope	Solar attachment, attic work and moisture control	Will near-term solar or attic work create rework?
Solar / storage	Load history, production model, equipment, roof plan, interconnection and warranty	Roof life, service capacity, tariff and critical loads	Does the design solve the stated financial or resilience objective?
Electrical / EV	Load calculation, panel condition, service rating, equipment location and permit scope	HVAC, battery, solar and future electrification	Is the upgrade sized for the planned sequence, not only today?

> **Scope boundary:** BetterPowered provides advisory, planning, assessment and contractor-matching services. Applicable installation and trade-specific work is performed by the responsible participating contractor.

When multiple pathways appear viable, compare them against the same outcomes, constraints and time horizon. A lower first cost can be reasonable; so can a higher-cost path that reduces rework or addresses an urgent risk. The important point is to make the tradeoff explicit.

Related resources: BetterPowered contractor network and commercial energy planning.

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5 · NORMALIZE CONTRACTOR PROPOSALS

Compare scope and assumptions—not just totals

Two proposals can look comparable while solving different problems. Before comparing price, normalize each proposal into the same set of fields.

Scope

- Exact equipment and materials
- Quantities and locations
- Removal, disposal and protection
- Testing, startup and closeout

Assumptions

- Existing-condition findings
- Measurements and sizing basis
- Owner-provided work
- Utility or permit assumptions

Exclusions

- Electrical, structural or finish repairs
- Permit and engineering costs
- Unknown-condition allowances
- Roof or access work

Accountability

- License and insurance evidence
- Manufacturer and labor warranties
- Change-order method
- Milestones and final documentation

Red flags that require clarification

- Large performance or savings claims with no stated assumptions.
- Equipment descriptions that omit model numbers or matched-system information.
- A proposal that treats permits, testing or commissioning as optional without explaining why.
- Conflicting scopes in the same attic, roof, panel or mechanical area with no coordination owner.
- Rebate language framed as guaranteed reimbursement before programme eligibility is confirmed.

> **Use a decision ledger.** Record the question, evidence reviewed, remaining uncertainty, responsible party and the point at which the decision must be revisited.

Related resource: contractor bid review for home energy upgrades.

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6 · TREAT INCENTIVES AS A SEPARATE WORKSTREAM

Verify eligibility before relying on a rebate

Incentives can affect project timing, product selection, documentation and contractor eligibility. Programme names and funding announcements are not proof that a specific property or project qualifies.

1. **Identify the programme administrator.**
   Start with the official utility, government agency or programme page.
2. **Confirm the current programme status.**
   Check whether it is open, paused, waitlisted, exhausted or scheduled for a future launch.
3. **Map eligibility to the property and applicant.**
   Income, ownership, location, equipment, existing conditions and contractor requirements may all matter.
4. **Confirm the order of operations.**
   Some programmes require pre-approval, an assessment or reservation before purchase or installation.
5. **Assign documentation ownership.**
   Decide who preserves estimates, product certificates, permits, invoices, photos and completion evidence.

> **Financial caution:** Do not sign a contract or borrow money based solely on an estimated incentive. Use confirmed programme rules and preserve a fallback budget if reimbursement changes or is delayed.

Incentive record

Official programme and source URL

Eligibility confirmed by / date

Pre-approval or reservation deadline

Required documents and responsible party

Related resource: Florida energy incentive and rebate planning.

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7 · MAKE THE NEXT DECISION VISIBLE

Finish with an actionable planning record

A complete planning cycle does not need to resolve every uncertainty. It should identify the next decision, the evidence needed for it and who is responsible for obtaining that evidence.

Decision to make

Evidence already reviewed

Field verification or documents still required

Dependencies on another project

Responsible party and due date

Decision criteria

Fallback if timing, cost or eligibility changes

> **BetterPowered can help:** organize available property evidence, identify decision gaps, plan upgrade sequence, review contractor proposals, research incentives and connect property owners with vetted participating contractors.

Learn more

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Energy advisory services
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Contractor matching

Important: This guide is educational and planning-oriented. It is not engineering, legal, tax, financial, code-compliance or trade-specific installation advice. Site conditions and programme rules should be verified by the appropriate qualified parties.

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